Membership Cards

Each new employee must complete both the front and the back of the membership card for the correct retirement system. Someone other than a designated beneficiary must witness the member's signature. For more information about membership cards, refer to the Membership Cards section under the specific retirement system.

The employees' names are input from the card and MPERA will request missing membership cards in a quarterly report to the employer.

Working retirees in PERS, SRS and FURS are not considered new members and should not complete a membership card. See the System Requirements for Working Retirees for further information

Correcting Social Security Numbers Online

If an incorrect social security number has been reported for an employee, use the following steps to correct the information.

If MPERA is not contacted directly regarding incorrect social security numbers, the employee's payroll information will remain in two separate accounts causing potential problems for the employee at a later date.

Copy Forward Users

1. Locate and highlight the employee with the incorrect social security number on the **Members** tab.
2. Click the ADD MEMBER button on the bottom left hand side of the screen. This will create a blank line below the highlighted member.
3. Type in the correct social security number. Verify entry before tabbing to new field.
4. Use the above line to verify remaining data that needs to be input for the employee. The hire date will need to be the same. Be sure to use current payroll information for earnings, contributions and hours.
5. Click on Save Data.
6. Highlight incorrect employee information and click the Delete Selected Member button.
7. Complete payroll report and submit payment.
8. Notify MPERA of the error so internal corrections can be made. If MPERA is not contacted directly, the employee's payroll information will remain in two separate accounts causing potential problems for the employee at a later date.
9. Once the corrected payroll is posted, MPERA will combine the accounts under the correct social security number.

Correcting Social Security Numbers Online Continued

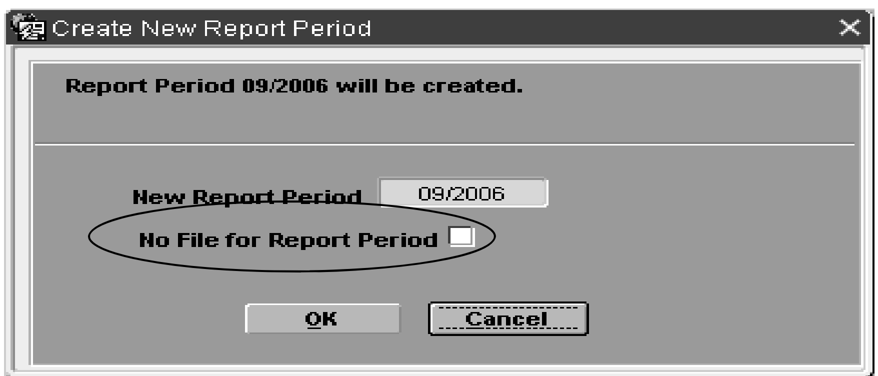
Transfer and Load Users

1. Correct the social security number in your internal system prior to creating your payroll file.
2. Complete payroll report and submit payment.
3. Notify MPERA of the error so we can make our internal corrections. If MPERA is not notified, the employee's information will remain in two separate accounts. This may cause potential problems for the employee at a later date.
4. Once the corrected payroll is posted, MPERA will combine the accounts under the correct social security number.

Summer Reporting

Some agencies, such as School Districts and Special Ed Co-ops, do not have paydays during certain times of the year. Agencies are still required to send notification for those paydays. This can be done by checking the No File for Report Period checkbox located in the Create New Report Period pop-up window for the specific paydays and then clicking the OK button.

DO NOT combine reports or change your payroll reporting period without pre-approval from MPERA



Paper reporters must notify MPERA of any changes prior to the final report of the fiscal year.

Reporting Outside Normal Schedule

Agencies **must** report each payroll according to the schedule they initially provide. Changes to this schedule are only allowed for extenuating circumstances and pursuant to pre-approval by MPERA. If your payroll frequency will vary from the normal schedule, contact MPERA for the pre-approval prior to submitting any payrolls.

Payroll History

Previous payroll reports can be accessed using the Payroll History option. All payroll reports from 12/2001 may be accessed from the MPERA Web Reporting site.

- Highlight the list item Payroll History and click 'Go'.
- The most current filed payroll report will open. To choose prior months, click the Report Period drop down menu in the upper right hand corner of the window. Using the scroll bar on the right, locate the report period you wish to access and click on it.
- You may view and print reports from the Payroll History section.

New Reporting Agencies

Only agencies new to MPERA should create a new payroll period. The option to create a new payroll report period can be found in the Payroll box located on the left hand side of the MPERA Web Reporting homepage. Unless a new agency is using the Transfer and Load File method, this option must be used to submit the initial payroll report.

- Highlight the list item Create New Report Period and click 'Go'.
- The Create New Report Period pop-up window will open. Click OK. This will open the payroll report.
- Follow instructions in the Payroll Report section for adding new employees.

All future reports will be reported using the Copy From Previous Report Period method. See the Payroll Report section for instructions.

ORP Payroll Reporting Information – Montana University System Only

To report Optional Retirement Plan (ORP) payroll information, click ORP Payroll under the Select Type of Payroll option at the top of the MPERA Web Reporting homepage. Refer to the Payroll Reports sections for directions on how to report.

Printing the Payroll Summary Screen

At the payroll summary tab, press the "Print Screen" key on the keyboard. It is normally found above the insert key. Depending on printer configuration, this may or may not actually print a copy. It will, however, capture an image and place it on the clipboard to be copied.

- Open either Microsoft Word or WordPerfect.
- At a blank page, click on 'edit' on the toolbar, select 'paste' from the drop-down menu. This will copy the summary page into the document.
- Click on 'file' on the toolbar and select 'print' from the drop-down screen to print the summary page.
- Attach the summary page to the payment when submitting to MPERA.

Service Purchase Contributions

To receive a cost statement and for information about initiating a service purchase contract, advise your employees to contact MPERA in writing.

IRS rules allow employees to purchase service by making additional contributions.

1. The additional contributions needed to purchase service may be made in two methods:

   a. After-tax payments made directly to MPERA by the member or

   b. Pre-tax payments through payroll deduction. (This method may only be used by active members/employees who complete a service purchase contract.)

   - A service purchase contract cannot be terminated except by death or termination of employment.
   - Payment schedules cannot be less than three months or more than 60 months (five years).
   - Employees and employers must complete the *Payroll Deduction Form* which authorizes the service purchase deductions. It is a three-part form: one copy for the employee, one for the employer, and one to be returned immediately to MPERA. A sample of this form and instructions are in the Service Purchase section for each retirement system.

2. **Do not** deduct payments without an approved service purchase contract. The completed contract must be received by MPERA prior to reporting.

ACH Authorization Form

ACH authorization forms may be printed from the Web Reporting homepage.

- Enter the Employer number in the appropriate box on the MPERA Web Reporting homepage. This will complete certain items on the form.
- Click on the Payroll box and highlight the list item ACH Authorization Form and click 'Go'.
- The form will open in Adobe Reader. Click on the printer icon on the toolbar or click on file and print from the menu bar.

Deleting Members From Reports

To Delete Members from a payroll report, highlight the member to be deleted, and select the Delete Selected Member button at the bottom of the screen on either the **Member** or **Member Errors tabs.**

System Exit

To exit MPERA Web Reporting, choose one of the following options:

- Click on the "open door" button on the toolbar.
- Click on the "X" button in the upper right corner of the screen.

Member Address Reporting

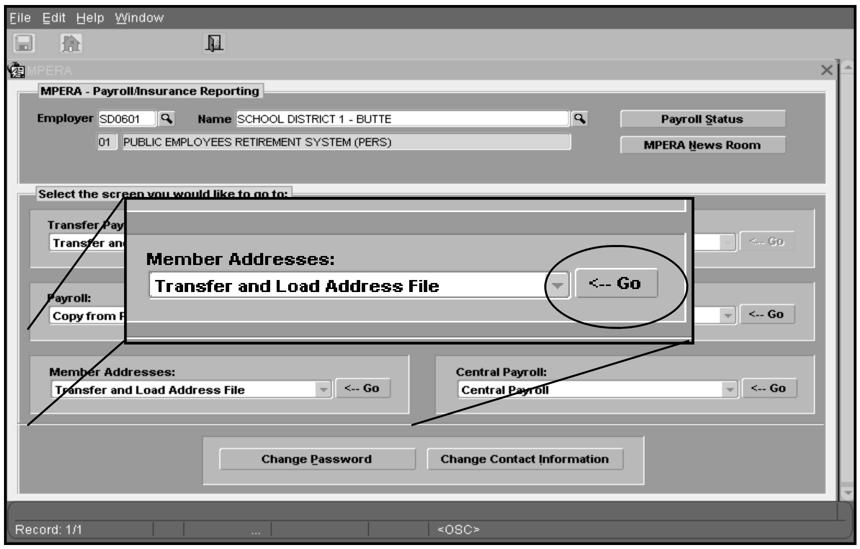
Each employer is required to provide current address information to MPERA on a monthly basis.

Maintaining current employee addresses allows MPERA to provide retirement information to members, and ease the burden on you, the employer. MPERA's Web Reporting allows the input of member addresses which updates our internal database. **Only report address for members of MPERA.**

Using MPERA's Web Reporting, you can both transfer and upload an electronic file and edit addresses directly on the website.

See page 3 of the Payroll Reports section for instructions to log on to the website . In the lower left corner of the home page is the MEMBER ADDRESSES block.

Transfer and Load Member Address Method



To upload an address file, click on GO to the right of the Transfer and Load Address file. The following window will be displayed:

Select the BROWSE button.

Member Address Reporting Continued

Navigate through the directory structure and locate the address file for transfer. Select the file by double clicking on it. The file path will appear in the BROWSE window.

Click on the SUBMIT button and wait for the screen which confirms the file has been successfully transferred, loaded and validated. If your address file loads successfully with no errors, you are done and no further action is required.

If you receive any error messages, you must correct the errors and revalidate your address file. To correct errors, follow the instruction below on editing addresses directly on the web.

Edit Addresses Directly on the Web

From the MPERA Web Reporting homepage, open the drop down menu in the MEMBER ADDRESSES block. Select Member Address File and click on GO. Click on the Edit button to the left of the members SSN. After you have edited all addresses, click on Validate Addresses. You may view errors by clicking on the Validation Messages by the Member Tab. Correct any errors and validate the address file. Continue until all errors are corrected.

If an employee terminates his or her employment, you will need to delete them from your address file. Highlight the member and click on Delete Selected Member. Once deleted, validate your file.

Addresses have been successfully submitted when the Status box reads "Ready to be Posted".

***Do not** use membership cards for address changes.*

For agencies who do not report online, send written notification to MPERA of any employee address change.

If you need assistance, contact MPERA.